CFMS CONTRACT TIPS AND HELPFUL HINTS

How to find an agency number

Use **AGNM**. The AGNM screen will allow you to look up agency numbers by the agency name. This screen displays the agency name in alphabetical order.

```
ENTER FUNCTION:                   TRANS: AGNM

  AGENCY BY NAME TABLE
  KEY IS AGENCY NAME


                    AGENCY NAME                      AGENCY
            ACCOUNTING                               322889
            ADMINISTRATION                           800024
            ADMITTING DEPT 2                         322245
            ADULT COMM - BASED REHAB PROG            450
            ADULT COMM - BASED REHAB PROG            450000
            ADULT COMMUNITY BASED REHAB PROGRAM      451PSC
            AGRIC-DAIRY INDUSTRY PROMOTION BRD       160PS1
```

How to find a Contract Number

Use **KANO**. The KANO screen will allow you to look up contract numbers by the agency number entered on KENT.   This screen displays the contracts in numerical order, which means the last contract entered can be found at the bottom of the list.

```
ENTER FUNCTION:                   TRANS: KANO
                                                           DATE:
04/24/01
  CONTRACTS BY PURCHASING AGENCY NUMBER TABLE              TIME:
10:02:17
  KEY IS AGENCY NUMBER AND CONTRACT NUMBER                 TERM: $DYV

  AGENCY NUMBER.....: 107PS1 : DOA-OFFICE OF STATEWIDE INFO SYSTEM

          CONTRACT                      TITLE
          556519             DOA/PURCHASING - INFORMS, INC.
          567814             OSIS & SIGN LANGUAGE SERVICES
```

Contract Status Flow

The Basic status flow for agency approved contract (if electronic approvals exist, status will go to AWP):

$$INI \rightarrow RDY \rightarrow AIN \rightarrow AWP \rightarrow APC$$

Basic status flow for Agency entered and OCR approved contract (if electronic approvals exist, status will go to AWP):

$$INI \rightarrow RDY \rightarrow AIN \rightarrow AWP \rightarrow APC \rightarrow SCR \rightarrow RCR \rightarrow SSS \rightarrow ACR$$

How to copy a contract

Use **KCPY**. KCPY will copy a contract header, contract lines, demographic data, and contract description. To copy a contract using KCPY:

1. Inquire on the contract you are copying.
2. Change status on KCPY to CPY. Your new contract number will be in the Copied to Contract Number field on KCPY.

How to change the agency number, begin date or end date after the contract has been encumbered

To change the agency number, begin date or end date after a contract has been encumbered, cancel the encumbrance by changing the status code on KENT to CEN. You will then be able to update the necessary fields. After KENT has been updated, you will need to add another KACG before encumbering the contract again.

However, if a KAMD or KINV record exists for the contract record, you will not be able to cancel the encumbrance with a CEN status code. In this case you will need to contact the ISIS Help Desk for instructions on how to change the vendor number, agency number, begin date, or end date.

USERS SHOULD ALWAYS VERIFY THE VENDOR NUMBER, AGENCY NUMBER, BEGIN DATE AND END DATE BEFORE THE CONTRACT RECORD HAS BEEN ADDED INTO CFMS. Verify that the vendor name displayed on VENC matches the vendor name on the legal document. If different, contact the Office of Statewide Reporting and Accounting Policy (OSRAP) to add a new location with the name indicated on the contract **or** the agency must change the name of the legal document.

How to change the vendor location code after the contract has been encumbered

Agencies may change **location codes** on contracts approved by the agency. The Office of Contractual Review (OCR) must change location codes on contracts approved by OCR.

KENT status code is at 833

You cannot encumber while in the pause mode. If you are trying to encumber while in pause, the status will to go **833**. If this does happen, end out of pause mode and change the status on KENT to ENO.

```
ENTER FUNCTION:                  TRANS: KENT
 CONTRACT ENTRY SCREEN                              DATE: 04/24/01
 KEY IS CONTRACT NUMBER                             TIME: 11:25:31
                                                    TERM: $DSK
 CONTRACT NUMBER: 500028    CONT REV #: 326-5078  AGCY CONT #: 12681
 CONT  PHYSICIAN; PROVIDE TREATMENT FOR CYSTIC   BASE CONT AMT:      10200.00
 TITL/                                           REMAINING-FY.:          0.00
 DESC  PHYSICIAN; PROVIDE TREATMENT FOR CYSTIC   ORIG CONT AMT:      10200.00
      FIBROSIS/MED. SERV. TO CHILDREN'S          # AMEND: 00 CLASS/SUB: 999 01
 STATUS CODE..: 833 : AT ACCTS FOR ENCUMBRANCE     NET AMD AMT:           0.00
```